
Date

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services and Development** Base Period: **10/1/00- 9/30/01**

1. Resource # 1

- A. Resource/benefit name: **Discount on Energy Costs Provided by Utility Companies: Reduction in Utility Rates.**
- B. Gross value of countable benefits provided by resource is base period: **\$ 174,279,022**
- C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**
- D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**
- E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): **\$ 174,279,022**

2. Type of resource: Cash XXX Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric (PG&E) Company, Pacific Power and Light (PP&L) Company, Sierra Pacific Power Company (SPPCo), Avista Utilities, Southwest Gas Corp., Imperial Irrigation District, City of Healdsburg, Sacramento Municipal Utilities District, Southern California Gas Company, Southern California Edison, Modesto Irrigation District, San Diego Gas and Electric, City of Santa Clara.

4. Brief description of resource:

10-30% Discount on monthly energy bills.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households are provided a 10-30% discount on their monthly energy bills.

6. Geographical area in which benefits were provided:

California - Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low-income households to whom benefits were provided in this base period: **2,008,228**

9. Eligibility standard(s) for low income households to whom benefits were provided:

 Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Redwood Community Action Agency, Community Services Department of San Bernardino County, Kern County EOC, Orange County Community Development Council, Inc., San Joaquin County Department of Aging, Nevada County Department of Housing, Great Northern Corporation, Riverside County Department of Community Action, Campesinos Unidos, Pacific Gas and Electric (PG&E) Company, Pacific Power and Light (PP&L) Company, Sierra Pacific Power Company (SPPCo), Avista Utilities, City of Healdsburg, Sacramento Municipal Utilities District, Southern California Gas Company, Southern California Edison, Anaheim Utilities, Modesto Irrigation District, San Diego Gas and Electric, City of San Luis Obispo, Imperial Irrigation District, Southwest Gas Corp., City of Santa Clara, EOC of San Luis Obispo, Ventura County Commission on Human Concerns and California Department of Community Services and Development.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

The benefits were quantified by the utility companies who maintain a separate rate schedule for individuals receiving a discount. On a monthly basis each utility company calculates the difference between the discounted billings and what would have been billed without the discount. Example: The non-discounted rate is .10924 cents/Kwh, the discounted rate is .09271 and Kwh used in the billing period is 683. Full price bill = \$74.61 (.10924 x 683) discount billing= \$63.32 (.09271 x 683) Discount = \$11.29 (\$74.61 - \$63.32).

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

 (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☒ D ☐ E ☒ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Benefits were distributed as described in California's FY 2001 LIHEAP State Plan. The discounted programs, referred to as California Alternate Rates for Energy (CARE), Reduced Rate Program (RRP), Low-Income Discount Program (LIDP) and Energy Assistance Program Rate (EAPR) have been coordinated with the federally funded energy assistance program LIHEAP. CSD has contracted with Avista Corp, City of Healdsburg, City of Santa Clara, Modesto Irrigation District, Pacific Power and Light, SPPCo, and the Sacramento Municipal Utilities District to provide income eligibility verification of utility customers participating within the utility sponsored reduced rate program. Contracting utility companies reimburse CSD for all services rendered under terms of verification and certification contract services agreement.

Because the eligibility criteria for HEAP and the utility reduced rate program offered by Avista Corp, Pacific Power and Light, and SPPCo are almost identical, a dual-purpose application was developed to serve the dual purpose of allowing individuals to apply for both programs. HEAP/CARE applications are either mailed or distributed by either CSD or its network of Community Services Agencies. Upon request from their customers, the utilities mail out applications as a result of utility or CSD network marketing.

Applicants either mail their HEAP/CARE applications to the local community services agency for processing or they receive in person, one-on-one, intake at the local level. Community services agencies utilize an automated services system, known as the California LIHEAP Automated Services System, for eligibility verification and client data input of both HEAP and CARE applicants. CSD provides PP&L, SPPCo, and Avista, with a computer tape/printout each week containing a listing of all applicants determined eligible for the CARE discount rate. The utility company then applies the discount to the eligible customers' accounts. Therefore, after eligibility has been determined, the applicant receives both the discounted rate and the HEAP benefit payment. These two benefits combined together allow for a greater impact in offsetting the costs of energy for these low-income households. Note: CSD also maintains toll free "800" telephone lines for customers to request an application or to inquire about HEAP and CARE Programs throughout the State.

For the City of Healdsburg, City of Santa Clara, Modesto Irrigation District and the Sacramento Municipal Utilities District (SMUD) the customers can obtain a copy of an application either from their respective utility company, through the local community action agency or directly from CSD. Once CSD processes the application, a computer tape/printout is then delivered each week to the utility company which contains a listing of all applicants determined eligible for the discount rate. The utility company then applies the discount to the eligible customers' accounts.

In addition, local agencies and CSD have coordinated the services provided under LIHEAP with the Pacific Gas and Electric Company, Southern California Gas Company; San Diego Gas and Electric, Southern California Edison and their reduced rate programs. The coordination of these programs enables the agencies to expand services to families who otherwise would not receive assistance due to lack of information about the programs. This coordination occurs through prearranged agreements between the local CSD/LIHEAP contractors and the utility companies.

The LIHEAP contractors work in direct conjunction with the utility companies by maintaining ongoing communication to screen and refer potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if the applicant from either source has already received any benefits. The applicant is provided assistance in completing an application for the reduced rate programs at the time the applicant is being assisted for HEAP.

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Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 2

A. Resource/benefit name: **Utility Company Weatherization - Weatherized Additional Low-Income Households: Cash benefits on behalf of recipient households for weatherization assistance.**

B. Gross value of countable benefits provided by resource during this base period: **\$10,801,276**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$10,801,276**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric Company, Southern California Gas Company, Southern California Edison Company, San Diego Gas and Electric Company, Southwest Gas Corporation, Pacific Power and Light Company, Sierra Pacific Power, Anaheim Utilities, Sacramento Municipal Utility District, and Avista Utilities.

4. Brief description of resource:

Private and municipal utility companies provided funds to weatherize LIHEAP-eligible households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See Item 4.

6. Geographical area in which benefits were provided:

Statewide - California.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **26,916**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Commission of Santa Barbara County, North Coast Energy Services, Campesinos Unidos, MAAC Project, Self-Help Home Improvement Project, Great Northern Corp., Orange County CDC, Community Enhancement Services, Pacific Gas and Electric Company, Southern California Gas Company, Southern California Edison Company, San Diego Gas and Electric Company, Southwest Gas Corporation, Pacific Power and Light Company, Sacramento Municipal Utility District, Sierra Pacific Power, Anaheim Utilities, Avista Utilities, Project Go, Veterans in Community Service, Maravilla Foundation, Colusa, Glenn and Trinity CAA, EOC of San Luis Obispo, Spectrum Community Services, Ventura County Commission on Human Concerns, Butte County Community Action Agency and San Bernardino County Community Services Department.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and labor used to install the measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

 (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☒ C ☐ D ☐ E ☒ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated and integrated with the LIHEAP program, in part, due to the fact that the local agencies provide for a single intake process for weatherization services and then determine which program best meets the need of the individual client. Due to the high demand for low-income weatherization in California, there are insufficient LIHEAP funds available to meet this need. Because this resource is administered by the same agencies that provide weatherization services, these funds allow for the weatherization of more LIHEAP-eligible households, than is possible with LIHEAP funds alone. Finally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity within the low-income community.

The agencies listed on Page 2, #10 of this resource coordinated their LIHEAP contracts with their utility company contracts which included the same allowable weatherization measures as listed in the LIHEAP contract. This leveraging enabled the agencies to weatherize additional low-income homes using the measures allowed within the utility contracts and are the same as those listed under Resource #5. All client files are documented and maintained at respective agencies.

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Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 3

A. Resource/benefit name: **Utility Company Weatherization - Combined with LIHEAP: Cash benefits on behalf of recipient households for weatherization assistance.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 1,352,394**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 1,352,394**

2. Type of resource: **XXX** Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric Company, Southern California Gas Company, Southwest Gas Corp., Sacramento Municipal Utility District, and Southern California Edison.

4. Brief description of resource:

Private and municipal utility companies provided funds to weatherize LIHEAP-eligible households with one or more of weatherization measures listed in Resource #5.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See Item 4.

6. Geographical area in which benefits were provided:

California - Statewide.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **3,294**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

Other - Specify:

10. Agency/agencies that administered resource/benefits:

Community Services Department of San Bernardino County, Riverside County Department of Community Action, Pacific Gas and Electric Company, Southern California Gas Company, Southwest Gas Corp., Sacramento Municipal Utility District, Southern California Edison, Community Resource Project, EOC of San Luis Obispo, North Coast Energy Services, Santa Barbara County CAA, and CAA of San Mateo.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of the local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and the labor used to install these measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 X A X B C D E F X G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP due to funds from both sources (LIHEAP and utility companies) being used in the same household. The low-income household, therefore, was further weatherized to prevent the loss of heated and/or cooled air from the dwelling. As a result of the coordination of the weatherization contracts, additional LIHEAP-eligible households received weatherization measures mentioned in Resource #5, as appropriate and as allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

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Grantee: **California Department of Community Services & Development** Base Period: **10-1-00- 9-30-01**

1. Resource # 4

A. Resource/benefit name: **Utility Company Weatherization Inspection**

B. Gross value of countable benefits provided by resource during this base period: **\$ 216,167**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 216,167**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed? Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southwest Gas Corp., Southern California Edison, Southern California Gas Company, Anaheim Utility, and Pacific Gas and Electric Company

4. Brief description of resource:

Private utility companies provided funds to inspect weatherized LIHEAP eligible households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Quality control is assured for weatherized low-income households.

6. Geographical area in which benefits were provided:

Riverside, Orange, Los Angeles, Solano, Yolo, Lake, Mendocino, and San Bernardino Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/01/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **8,480**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

San Bernardino Community Services Department, Orange County CDC, Riverside County Department of Community Action, Pacific Asian Consortium in Employment, and North Coast Energy Services.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

San Bernardino: \$35 x 166 units = \$5,810; \$35 x 9 units = 315; \$30 x 698 units = \$20,940

North Coast: \$45 x 281 units = \$12,645

Orange: \$54 x 89 units = \$4,806

Riverside: \$43 x 50 units = \$2,150

**Pace: \$25.43 x 4,316 units = \$109,755.88
\$20.81 x 2,871 units = \$59,745.51**

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

XXX (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

_____ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____A _____B _____C _____D _____E _____F _____G _____H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

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Grantee: **California Department of Community Services and Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 5

A. Resource/benefit name: **Bulk Purchase Discount for Weatherization Materials.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 3,495,374**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$3,495,374**

2. Type of resource: Cash XXX Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Bulk purchases of weatherization materials were made at over 50 various businesses located throughout the State (e.g. Lumberjack, Home Depot, building-material suppliers, hardware stores).

4. Brief description of resource:

Weatherization materials purchased in bulk at a discount included those needed for Minor Home repairs. These repairs are necessary for the effective performance or preservation of weatherization materials or to prevent air infiltration. Minor Housing Envelope Repair purchases included paint used to protect the materials installed; door shoes, door locksets (knobs), raindrips, automatic door bottoms, and the hardware associated with the repair (nails, screws, anchors, etc.) of heating and cooling ducts.

Weatherization materials purchased also included weatherstripping, insulation cellulose, door weatherstripping, thresholds, hot water heater blankets, cooler covers, low-flow showerheads, doors, thermopane windows, glass, hardware, attic vents, heating units, set-back thermostats, latex glazing, tape header jackets, and caulking.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount on materials allowed for additional dwellings to be weatherized with one or more of the following measures: Glass replacement, attic venting, ceiling insulation, low-flow showerheads, evaporative cooler vent covers, door weatherstripping, water heater blankets, water heater pipe wrap, duct wrap, switch and outlet gaskets, caulking, and nondoor weatherstripping, ceiling fans, evaporative cooler repair, filter replacement for air conditioning or furnace units, floor foundation venting, floor insulation, gas/electric water heater timers, setback thermostats, shadescreens, shutters, storm windows, tinted film, wall insulation, water-flow-restricting devices, wood-fueled space heaters, furnace/boiler replacement and heating/air conditioning source repair.

Contractors must maintain a separate file for each applicant certified as eligible to receive weatherization assistance. Each file must contain an Intake and Job Order Sheet which is used for client intake, assessment of the dwelling and inspection of the weatherization measures installed; copies of source documents supporting eligibility; and a Building Check and Job Order Sheet, which is used for documenting repairs, labor hours and costs.

6. Geographical area in which benefits were provided:

Statewide - California.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **13,757**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

Other - Specify:

10. Agency/agencies that administered resource/benefits:

Orange County CDC, Ventura County Commission on Human Concerns, Santa Cruz CAB, Maravilla Foundation, Campesinos Unidos, Inc., Community Services Department of San Bernardino, CAC of Santa Barbara County, Project Go, Inc., Redwood CAA, Economic and Social Opportunities, Kern County EOC, San Francisco EOC, Colusa, Glenn, Trinity CAA, North Coast Energy Services, Great Northern Corp., El Dorado County DCS, San Joaquin County DOA, CAA of San Mateo, CAA of Butte County, MAAC Project, C-SET, Pacific Asian Consortium in Employment, Community Resource Project, Lassen-Plumas-Sierra CAA, EOC of San Luis Obispo, Community Enhancement Services, Riverside County Department of Community Action, Merced County Community Action Agency, and City of Berkeley.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Each local agency identified the Fair Market Value of the items purchased and the amount actually paid. Fair Market Values were identified by determining what an individual would pay, in the local area, to purchase a single item. The difference between Fair Market Value and the Actual Price paid is the Value of this resource.

The number of households which benefited was determined by dividing each agency's average cost per dwelling into the amount of the savings. This represents the number of additional dwellings weatherized due to this resource.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☒ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Direct negotiations with local suppliers of weatherization materials for the LIHEAP Program resulted in lower than market costs for materials purchased in bulk quantities. As a result of the resources generated from the discount received from these bulk purchases, additional LIHEAP eligible homes received weatherization measures as appropriate and allowable within the LIHEAP contract.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 6

A. Resource/benefit name: **Utility Appliance Programs: Purchase and delivery of other tangible items that help low-income households meet the cost of home energy.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 2,822,817**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 2,822,817**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed? Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southern California Edison, Sacramento Municipal Utility District, and Southern California Gas Company, Pacific Gas and Electric Company.

4. Brief description of resource:

Purchase and installation of energy efficient stoves/ranges, water heaters, evaporative coolers, refrigerators, and furnaces which were used in the dwelling for the purpose of heating/cooling.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received energy-efficient appliances at no cost.

6. Geographical area in which benefits were provided:

Los Angeles, Riverside, Sacramento, Stanislaus, and San Bernardino Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **4,429**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

Other - Specify:

10. Agency/agencies that administered resource/benefits:

DCA of Riverside County; San Bernardino County Community Services Department; Maravilla Foundation; Central Valley Opportunity Center; and Community Resource Project.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies listed in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified by determining FMV of the appliances and the cost of installation.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 X A B X C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because LIHEAP eligible and other low-income applicants are identified as needing repair or replacement of appliances during the time the dwelling is being assessed for weatherization services. Additionally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity in the low-income community.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 7

A. Resource/benefit name: **Utility/Vendor Donated Repair: Donated labor and materials to repair and install tangible items that help low-income households meet the cost of home energy.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 106,560**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 106,560**

2. Type of resource: Cash Discount/waiver **XXX** In-kind contribution

If more than one type of resource is claimed? Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southern California Edison, Pacific Gas and Electric Company, Tri-State Home Improvement, Inc.

4. Brief description of resource:

Repair or replace gas appliances (furnaces, gas stoves and hot water heaters) and evaporative coolers.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received repairs/replacements of gas appliances and evaporative coolers at no cost.

6. Geographical area in which benefits were provided:

Riverside, Humboldt Counties

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **428**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

Other - Specify:

10. Agency/agencies that administered resource/benefits:

Redwood CAA, Riverside County Department of Community Action

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified using the actual cost of the parts to repair, or the cost of the appliance to replace, plus the cost of installation.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 X A B C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because eligible households are identified as needing replacement appliances during the time the dwelling is assessed for LIHEAP weatherization services. In addition, some of the appliances replaced posed a potential safety hazard for the household which would have been exacerbated by the weatherization services.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 8

A. Resource/benefit name: **Utility Bill Assistance Combined with LIHEAP: Cash Benefit on Behalf of Low-Income Households for Energy Crisis.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 2,498,393**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 2,498,393**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric Company, Salvation Army REACH, United Way, Private donations, Churches, American Red Cross, San Diego Gas and Electric, Imperial Irrigation District, St. Joseph's Healthcare Foundation, Valley Churches United Missions, and the Catholic Social Services.

4. Brief description of resource:

Assisted clients with energy bills in conjunction with LIHEAP energy assistance.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Prevented the shut-off of utilities for low-income households by combining the resources.

6. Geographical area in which benefits were provided:

Stanislaus, Santa Clara, Kern, San Joaquin, Monterey, Riverside, Orange, San Mateo, San Luis Obispo, Nevada and Santa Cruz Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **11,113**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Santa Cruz CAB, San Joaquin DOA, Economic and Social Opportunities, Central Valley Opportunity Center, Orange County CDC, Kern County EOC, Riverside County Department of Community Action, San Mateo County Community Action Agency, San Luis Obispo County Economic Opportunity Commission, Nevada County Housing and Community Services, Pacific Gas and Electric Company, Salvation Army REACH, United Way, Private donations, Churches, American Red Cross, Valley Churches United Missions, St. Joseph's Healthcare Foundation, San Diego Gas and Electric, California Department of Community Services and Development and the Catholic Social Services.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local public and private agency, churches, and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual amount of the utility bill paid on behalf of the client.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

 (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 X A X B C D X E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP due to funds from both sources (LIHEAP and utility companies/third-party co-payments) being used in the same household. The low-income household benefited by receiving LIHEAP assistance in addition to assistance from either the utility company program or third-party co-payment once the LIHEAP program's maximum level of assistance was reached.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 9

A. Resource/benefit name: **Utility Bill Assistance - Payment for Additional Households without LIHEAP: Cash benefits on behalf of recipient households for energy crisis.**

B. Gross value of countable benefits provided by resource during this base period: **\$4,786,344**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$4,786,344**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric Company/Salvation Army REACH, American Red Cross, Southern California Edison/WEAF, Southern California Gas Company/GAF, Santa Clara County Social Services Agency Emergency Assistance Network, City of San Jose, County of Santa Clara, United Way, City of Riverside Public Utilities Company, County of San Luis Obispo, Sierra Pacific Energy Assistance Project, WP Natural Gas Energy Assistance Program, Imperial Irrigation District, City of Ukiah Electric Company, and UP Natural Gas Energy Assistance.

4. Brief description of resource:

Payments made directly to utility providers on behalf of low-income households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Prevented the shut-off of utilities for low-income households.

6. Geographical area in which benefits were provided:

California – Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **32,947**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.

XXX Income at or below 60% of State median income.

 Other - Specify:

10. Agency/agencies that administered resource/benefits:

El Dorado County Department of Community Services, Riverside County Department of Community Action, Ventura County Commission on Human Concerns, San Joaquin County Department of Aging, Campesinos Unidos, Inc, North Coast Energy Services, C-SET, Economic and Social Opportunities, Inc., San Luis Obispo County Economic Opportunity Commission, Pacific Gas and Electric Company/Salvation Army REACH, American Red Cross, Southern California Edison/WEAF, Southern California Gas Company/GAF, United Way, City of Riverside Public Utilities Company, Sierra Pacific Energy Assistance Project, WP Natural Gas Energy Assistance Program, Spectrum, California Department of Community Services and Development and Imperial Irrigation District.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual amount of the utility bill paid on behalf of the client.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

 (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

XXX (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☒ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

To ensure that low-income households have year-around access to energy assistance and that the greatest number of low-income households receive assistance, local agencies have coordinated the services provided under LIHEAP with local private and public energy assistance programs. The coordination of these programs enables the agencies to expand emergency services to families who otherwise would not receive assistance through LIHEAP due to insufficient funds. This coordination occurs through prearranged agreements between the local LIHEAP contractors and the utility assistance providers. The LIHEAP contractors work in direct conjunction with the utility assistance providers by maintaining ongoing communication to screen potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if any benefits have already been received by the applicant from either source. To ensure that assistance is provided to the families most in need, State law limits LIHEAP energy assistance eligibility to 60% of State Median Income. Therefore, the local agencies coordinate with these funding sources to provide emergency assistance to LIHEAP-eligible households which are over the State income guidelines.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # **10**

A. Resource/benefit name: **Donated Unpaid Services**

B. Gross value of countable benefits provided by resource during this base period: **\$ 209,744**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B.): **\$ 209,744**

2. Type of resource: ☐ Cash ☐ Discount/waiver ☒ **XXX** In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

California Conservation Corps, San Mateo County Probation Department, Court Work Program, California Conservation Corps., Citizen's Housing Corp. and Community Development

4. Brief description of resource:

Staff persons and vendors donated hours to the LIHEAP Weatherization program.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Service to eligible LIHEAP clients. Staff/vendors assisted in the installation of weatherization materials (as listed in Resource #5) to homes; repairing and replacing heating units and water heaters and manufacturing shadescreens.

6. Geographical area in which benefits were provided:

San Mateo and Butte Counties

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **962**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- XXX** Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

CAA of San Mateo, Butte County Community Action Agency.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records: daily staff logs and time sheets.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

San Mateo: \$35 per hour x 73 hours = \$2,555; \$44 per hour average wage x 1192.3 hours = \$52,461

Butte: \$12 per hour x 12,894 hours = \$154,728

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # **11**

A. Resource/benefit name: **In-House Manufacturing: Reduction in the cost of weatherization materials installed.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 267,642**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 267,642**

2. Type of resource: Cash **XXX** Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

R. Lang, North Coast Energy Services, MAAC Project, ACI Glass, Project Go, Inc., Great Northern Corp., Colusa, Glenn Trinity CAA, El Dorado County Department of Community Services, Central Valley Opportunity Center, Eddie Dillon Home Improvement, Round Tree Glass, Applied Energy Product, AM Conservation, Lassen Economic Development Corp.

4. Brief description of resource:

In-house manufacturing of storm windows, solar screens, glass windows and cooler covers.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Materials manufactured in-house at cost enabled agencies to service more low-income households.

6. Geographical area in which benefits were provided:

Glenn, Colusa, Trinity, Lake, Mendocino, Placer, San Diego, Siskiyou, El Dorado, Alpine, Lassen, Plumas, Sierra, Nevada, Yolo, Solano, and Stanislaus Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **1,116**

9. Eligibility standard(s) for low income households to whom benefits were provided:

☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

Colusa, Glenn, Trinity CAA, Project Go, Central Valley Opportunity Center, MAAC Project, North Coast Energy Services, Great Northern Corp., Plumas CCDC, and El Dorado County DCS.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records and local vendor records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual cost charged to LIHEAP versus fair market value determined by local vendors = net countable difference.

FMV	\$690,332
Actual	<u>422,690</u>
Discount	267,642

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

☒ **XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # **12**

A. Resource/benefit name: **Corporate Cash Donations: Cash benefit for weatherization services.**

B. Gross value of countable benefits provided by resource during this base period: **\$ 74,343**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 74,343**

2. Type of resource: **XXX** Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Corporate cash donation and local jurisdiction contributions.

4. Brief description of resource:

Corporate funds allocated for utility assistance, emergency fund accounts and for direct weatherization.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Funds used for assistance with utility deposits and emergency home repairs which enabled weatherization of dwelling. Types of weatherization assistance provided included installation of one or more of the weatherization measures as listed in Resource #5.

6. Geographical area in which benefits were provided:

Alameda, San Mateo, Santa Barbara Counties

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00- 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **116**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

CAA of San Mateo, City of Berkeley, Santa Barbara County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Santa Barbara: \$58,274.00 donated, divided by \$702.09 per home = 83 homes

San Mateo: \$993.00 donated, divided by \$331.00 per homes = 3 homes

Berkeley: \$15,076.00 donated, divided by \$502.53 per home = 30 homes

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ **XXX** (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☒ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Funds were used in conjunction with LIHEAP to assist with utility deposits; to repair homes prior to receiving weatherization materials and for direct weatherization of LIHEAP eligible households which would not have received assistance due to lack of funding availability. As a result of the resources generated from these cash donations, additional LIHEAP eligible households received weatherization measures mentioned in Resource #5 as appropriate and allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00- 9-30-01**

1. Resource # **13**

A. Resource/benefit name: **Discounted Fuel: Wood Contributed to Program**

B. Gross value of countable benefits provided by resource during this base period: **\$ 78,880**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$ 78,880**

2. Type of resource: Cash XXX Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Wood suppliers in Colusa, Glenn, Trinity, Lassen, Plumas, and Sierra Counties.

4. Brief description of resource:

Discount of firewood purchased for low-income clients.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Reduced price on wood purchased with LIHEAP funds and distributed at no-charge to low-income households.

6. Geographical area in which benefits were provided:

Colusa, Glenn, Trinity, Lassen, Plumas, and Sierra Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00- 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **630**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

Colusa, Glenn, Trinity CAA, Lassen-Plumas-Sierra CAA.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Colusa, Glenn, Trinity CAA: FMV 1248 cords at \$135 per cord = \$168,480; Actual 1248 cords at \$100 per cord = \$124,800; Discount of \$43,680.

Plumas: FMV 880 cords at \$140 per cord = \$123,200; Actual 880 cords at \$100 per cord = \$88,000; Discount of \$35,200.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ **XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

____A ____B ____C ____D ____E ____F ____G ____H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not Applicable.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGE**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: California Department of Community Services & Development **Base Period:** 10-1-00 - 9-30-01

1. Resource # 14

A. Resource/benefit name: Donated Weatherization Materials

B. Gross value of countable benefits provided by resource during this base period: \$ 50,546

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): \$ 50,546

2. Type of resource: Cash Discount/waiver XXX In-kind contribution

If more than one type of resource is claimed? Gross value of countable benefits provided by each type of resource:

3. Source of resource:

City of Oroville, Almanor Energy, Citizen Housing Corp. and Community Development

4. Brief description of resource:

Donation of weatherization materials used to repair walls after the repair and/or replacement of windows, doors, stoves, furnaces and water heaters.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received weatherization services at no charge.

6. Geographical area in which benefits were provided:

Lassen, Butte, and San Mateo Counties

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: 609

9. Eligibility standard(s) for low income households to whom benefits were provided:

☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

CAA of Butte, Lassen-Plumas-Sierra Community Action Agency, San Mateo County CAA

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

The actual cost of the materials were used to determine the value of this resource.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ **XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

____A ____B ____C ____D ____E ____F ____G ____H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # **15**

A. Resource/benefit name: **Donated Fuel**

B. Gross value of countable benefits provided by resource during this base period: **\$665**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$665**

2. Type of resource: Cash Discount/waiver **XXX** In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Wood providers of Nevada County and miscellaneous donations.

4. Brief description of resource:

Donation of fuel (wood) to the LIHEAP program for eligible low-income clients.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received firewood at no cost.

6. Geographical area in which benefits were provided:

Nevada County

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **12**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

Nevada County Housing and Community Services

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency Records

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Nevada: FMV of 3.5 cords at \$190 per cord = \$665.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ **XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

____A ____B ____C ____D ____E ____F ____G ____H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 16

A. Resource/benefit name: **Discount on Services Rendered.**

B. Gross value of countable benefits provided by resource during this base period: **\$858,240**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): **\$ 0**

D. Costs and charges to low income households to participate/receive these benefits: **\$ 0**

E. Net value of countable benefits provided by resource during this base period
(To calculate item E, subtract items C and D from item B): **\$858,240**

2. Type of resource: Cash XXX Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

RMCI, Consumer Protection Refrigeration, Air Solutions Heating and Air, Jonas Oil Co., J.C. Enterprises, Service Experts, Oasis Heating and Air Conditioning Co., Tri-State Home Improvement, Airway, Sundowner Insulation Co.

4. Brief description of resource:

Below Fair Market Value of repair/replacement of furnaces for LIHEAP Weatherization Program and discounts received on the cost of installing weatherization measures. Types of weatherization assistance provided included the installation of one or more of the weatherization measures as listed in Resource #5.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount allowed additional low-income clients to be served.

6. Geographical area in which benefits were provided:

Kern, Santa Clara, Fresno, San Diego, Sacramento, Imperial, Lake, Mendocino, Solano, Yolo, Alameda, Sutter, Yuba, Santa Barbara, and Riverside Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **2,657**

9. Eligibility standard(s) for low income households to whom benefits were provided:

XXX Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Kern County EOC, Community Resource Project, Fresno County EOC, Economic & Social Opportunities, Campesinos Unidos, Inc, North Coast Energy Services, Spectrum, Santa Barbara County CAA, and Riverside County Department of Community Action.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

ESO: FMV \$103,429, Actual \$82,743, Discount (20%) \$20,686

CRP: FMV \$122,078, Actual \$110,980, Discount (9%) \$11,098

North Coast: FMV \$464,280, Actual \$435,080, Discount (6%) \$29,200

Spectrum: FMV \$409,704, Actual \$204,732, Discount (50%) \$205,412

Campesinos Unidos: FMV \$311,500, Actual \$190,550, Discount (39%) \$120,950

Kern: FMV \$138,596, Actual \$125,996, Discount (9%) \$12,600

Riverside: FMV \$322,112, Actual \$315,796, Discount (2%) \$6,316

Fresno: FMV \$1,483,665, Actual \$1,072,529, Discount (29%) \$411,136

**Santa Barbara: \$81.60 x 115 units = \$9,384
\$32.10 x 980 hours = \$31,458**

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services & Development** Base Period: **10-1-00 - 9-30-01**

1. Resource # 17

A. Resource/benefit name: **Weatherization Energy Efficiency Rehabilitation Contract - Combined with LIHEAP: Cash benefits on behalf of recipient households for weatherization assistance.**

B. Gross value of countable benefits provided by resource during this base period: \$ **5,306,357**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ **0**

D. Costs and charges to low income households to participate/receive these benefits: \$ **0**

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B.): \$ **5,306,357**

2. Type of resource: XXX Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
California Department of Community Services and Development, California Conservation Corps. Petroleum Violation Escrow Account Funds.

4. Brief description of resource:

Weatherized additional LIHEAP-eligible households with one or more of weatherization measures listed in Resource #5.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See item #4.

6. Geographical area in which benefits were provided:

Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/00 - 9/30/01

8. Number of low income households to whom benefits were provided in this base period: **4,830**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☒ **XXX** Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

CAA of Butte County, Riverside County Department of Community Action, CRP, Amador-Tuolumne CAA, North Coast Energy Services, Fresno County EOC, CAB of Santa Cruz, C-SET, VC Commission on Human Concerns, Orange County Community Development Council, Central Valley Opportunity Center, ESO, Community Services Department of San Bernardino County, Community Enhancement Services, Self-Help Home Improvement Project, Maravilla Foundation, EOC of San Luis Obispo, Campesinos Unidos, Merced County Community Action Agency, Colusa-Glenn-Trinity Community Action Agency, San Joaquin County Department of Aging, Children's and Community Services, Project GO, Great Northern Corp., and Kern County EOC.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of the local agencies and the California Conservation Corps.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install these measures. All of these costs were paid from funds provided through a contract with the Department of Community Services and Development/California Conservation Corps., utilizing PVEA funds.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ **XXX** (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services and Development** Base Period: **10-01-00-09-30-01**

1. Resource # **18**

A. Resource/benefit name: **Donated Paid Staff Services**

B. Gross value of countable benefits provided by resource during this base period: \$ **65,969**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ **0**

D. Costs and charges to low income households to participate/receive these benefits: \$ **0**

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ **65,969**

2. Type of resource: ☐ Cash ☐ Discount/waiver ☒ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Employees of California Conservation Corps, Randy Herndon Plumbing and Heating and Proland Management Co.

4. Brief description of resource:

Donated staff labor to assist with weatherization work

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See above

6. Geographical area in which benefits were provided:

Los Angeles, Ventura Counties

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10-01-00 – 9-30-01

8. Number of low-income households to whom benefits were provided in this base period: 852

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☒ Income at or below 150% of the poverty level.
☐ Income at or below 60% of State median income.
☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

Pacific Asian Consortium in Employment, Ventura County Commission on Human Concerns

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

PACE: FMV \$19.27 per hour at 344 hours = \$6,628

Ventura: FMV \$5.75 hour at 10,320 hours = \$59,340

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☒ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☐ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

____A ____B ____C ____D ____E ____F ____G ____H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: **California Department of Community Services and Development** Base Period: **10-1-00 – 9-30-01**

1. Resource # **19**

A. Resource/benefit name: **California Low-Income Home Energy Assistance Program (CAL-LIHEAP)**

B. Gross value of countable benefits provided by resource during this base period: \$ **15,621,446**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ _____

D. Costs and charges to low income households to participate/receive these benefits: \$ _____

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ **15,621,446**

2. Type of resource: **XXX** Cash _____ Discount/waiver _____ In-kind contribution _____

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

California Department of Community Services and Development; State of California – CAL-LIHEAP Program Funds (State General Fund)

4. Brief description of resource:

Weatherized additional LIHEAP-eligible households with one or more of weatherization measures listed in Resource #5 and assisted clients with energy bills in conjunction with LIHEAP energy assistance.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See item #4.

6. Geographical area in which benefits were provided:

Statewide -- California

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

6-1-01 – 9-30-01

8. Number of low-income households to whom benefits were provided in this base period: **23,996**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- ☐ Income at or below 150% of the poverty level.
- ☒ Income at or below 60% of State median income.
- ☐ Other - Specify:

10. Agency/agencies that administered resource/benefits:

Pacific Asian Consortium in Employment (PACE), Community Enhancement Services (CES), Maravilla Foundation, City of Berkeley, Riverside County Department of Community Action, San Bernardino County Community Services Department, Self-Help Home Improvement Project, Inc., Economic and Social Opportunities, Ventura County Commission on Human Concerns, Orange County Community Development Council, Inc., Kern County Economic Opportunity Corp., San Joaquin County Department of Aging and Community Services, San Mateo County Community Action Agency, Inc., Amador-Tuolumne Community Action Agency, Campesinos Unidos, Inc., Merced County Community Action Agency, Santa Cruz County Community Action Board, Inc., Spectrum Community Services, Inc., San Luis Obispo County Economic Opportunity Commission, Inc., Central Valley Opportunity Center, Inc., North Coast Energy Services, Colusa-Glenn-Trinity Community Action Agency, Metropolitan Area Advisory Committee (MAAC), Lassen-Plumas-Sierra Community Action Agency, Project GO, Inc., Community Services and Employment Training, Inc. (C-SET), Great Northern Corporation, Veterans in Community Services, Inc. (VICS).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

State of California, Department of Community Services and Development and local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install these measures. Actual amount of utility bill paid on behalf of the client. All of these costs were paid from funds provided through a contract with the Department of Community Services and Development.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 X A B X C D E F X G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

On April 11, 2001, in response to California's energy crisis, Governor Gray Davis signed Senate Bill 5X, which appropriated to the Department of Community Services and Development \$120 million from the State General Fund, to implement a new California Low-Income Home Energy Assistance Program (CAL-LIHEAP). These funds are to be used for the purpose of supplementing the federal Low-Income Home Energy Assistance Program (LIHEAP) and to increase participation in the LIHEAP program. CAL-LIHEAP is designed to 1) increase energy conservation and reduce demand for energy services in low-income households, and 2) assure that the most vulnerable households cope with high-energy costs. CAL-LIHEAP program components will include weatherization and conservation services, energy crisis intervention services and cash assistance payments. Eligible clients can receive assistance under both programs. Under the CAL-LIHEAP Weatherization component, Service Providers will spend the maximum amount of funds for weatherization assistance, but in no event less than 50 percent of the funds available by grantee. The balance will be used for cash assistance and energy crisis intervention.